



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

Date: 8/16/2006

GAIN Report Number: JO6007

Jordan

HRI Food Service Sector

Hotel, Restaurant, Institutional Food Service

2006

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Report Highlights:

Jordan's HRI sector, primarily hotels and restaurants, is the second largest export sector, second highest source of income, and most rapidly growing business sector. Development in the institutional food service sector, however, remains sluggish and does not match the growing needs of the market.

The U.S.-Jordan FTA created many opportunities for U.S. food suppliers, but the higher freight costs and fierce competition from neighboring Arab countries and adjacent EU suppliers still hinders U.S. market penetration..

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Amman [JO1]
[JO]

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DISCLAIMER:

The Agricultural Trade Office of the USDA/Foreign Agricultural Service in Amman, Jordan has prepared this report for U.S. exporters of the domestic food and retail food sector. While every possible care has been taken in the preparation of this report, the information provided might be dated, as some import requirements are subject to frequent changes. It is highly recommended that U.S. exporters ensure that all necessary customs clearance requirements have been verified with local authorities through your foreign importer before the sale conditions are finalized. FINAL IMPORT APPROVAL OF ANY PRODUCT IS ALWAYS SUBJECT TO THE RULES AND REGULATIONS AS INTERPRETED BY THE COUNTRY OF IMPORT AT THE TIME OF PRODUCT ENTRY.

I. MARKET SUMMARY

Jordan continues to go through major changes begun in the mid-nineties with an economic reform process that included Jordan's accession to World Trade Organization (WTO) in the year 2000. These reforms helped improve the links between Jordan's economy and the global one, with commitments to liberalize the movement of people, goods and services across borders. One of the sectors in Jordan's economy benefiting most from these changes has been tourism, including hotels, restaurants and food.

Tourism is of vital importance to the national economy of Jordan. It is one of the Kingdom's largest export sectors, the second largest private sector employer, and the second largest source of foreign exchange. Tourism generated more than US\$ 1,440 million in revenue in 2005 and accounts for approximately 9 percent of the country's gross domestic product (GDP); this figure is expected to double within the next five years.

Jordan is a net food importing country that depends on imports for basic food items such as wheat, barley, corn, dairy products, sugar, red meat, rice, legumes and canned food items; it is, however, self-sufficient in a number of agricultural products, including fresh fruits, vegetables, and poultry. The capital Amman is the main and largest market. Below are basic economic data for Jordan:

- Nominal GDP is US\$ 12.9 billion, real GDP growth rate is 7.2 percent
- GDP per capita at the end of 2004 is US\$ 2,152/year
- Total exports in 2005: US\$ 4.3 billion
- Total imports in 2005: US\$ 10.5 billion
- Total imports from the U.S. in 2005: US\$ 588 million
- Total food imports from the U.S. in 2005: \$50 million
- Total agricultural imports from the U.S. in 2005: \$121 million
- Total agricultural imports in 2005: \$1,445 million
- U.S. agricultural market share in 2005: 8.4 percent
- U.S. food market share in 2005: 7 percent

Jordan's Hotel, Restaurant, Institutional (HRI) Food Service market is diverse. The food service is divided into hotels and restaurants. The hotel sector comprises an estimated 468 hotels, motels, camping grounds, apartments and hostels; approximately 470 restaurants; more than 233 celebration halls; over 122 coffee shops and cafeterias, and 24 pubs and bars. The institutional food service companies, such as company cafeterias, schools, universities, hospitals and prison kitchens are still weak and do not reflect the potential of the industry, according to a major catering company's marketing manager. The Jordanian Army Force (JAF) is probably the largest institutional food consumer in Jordan: it consumes 660 tons of wheat bread annually. It is also one of the major institutional food producers, as

it produces around 110,000 tons annually of biscuits for school students. This figure is expected to double next year. Both the JAF and the institutional food service companies use American soybean flour as a fortifying ingredient to improve the flavor and nutritional value of the bread and biscuits.

Jordanian expenditure on food and beverages was U.S.\$ 189 million out of US\$ 1,134 millions spent on all internal trade activities (2003 DoS Survey), while annual household expenditure on food and beverages in 2003 was US\$ 3166. Estimating potential growth of the HRI sector is difficult due to regional political instability that affects the economy and specifically, tourism, hotels and restaurants.

The HRI sector has expanded significantly during the last decade. Nevertheless, the HRI market has mirrored the ups and downs of the peace process. It recovered from the last recession induced by second *Intifada* outbreak in September 2000, from the September 11, 2001 attacks in the U.S. and the November 9, 2005, attacks on Amman hotels. Indeed, tourist receipts grew rapidly to reach 5.8 million tourist arrivals in 2005 with US\$ 1.4 billion in total receipts.

Table 1: Main Tourism Indicators, 2002 - 2005

Items	2002	2003	2004	2005	Relative change % 2004/2005
Numbers of Arrivals and Tourists					
Total Number of Arrivals (Million)	4.7	4.6	5.6	5.8	4.1
Tourist (overnight visitors) (Million)	2.4	2.35	2.85	3.0	4.7
Same Day Visitors (Million)	2.3	2.25	2.7	2.78	3.5
Tourism Income / USD Million	1048	1061	1330	1440	12
Average Length of Stay	4.0	4.4	5.0	5.0	
Direct Employment in Tourism Sector (thousand)	21	22	23	29	25
Number of Tourist Activities					
Classified & Unclassified Hotels	461	458	463	468	1.1%
Tourist Restaurant	376	374	448	525	17%
Number of Rooms in Hotels	19,389	19,698	19,945	20,827	1.3
Number of Beds in Hotels	37,289	37,859	38,658	40,480	2.1
Room Occupancy for Classified and unclassified Hotels%	32.00	34.20	45.20	48.00	6. %

Source: Ministry of Tourism & Antiquities

Table 2: Type and number of food service establishment in Jordan in 2005

Type of Establishment	Number of Establishments	Number of food institutions**
Hotels*	468	
Hotels	199	500
Youth hostels and Camping grounds	151	130
Guest Apartments and Suites	118	10
Restaurants*		
Restaurants	101	101
Fast food Restaurants	67	67
Celebration Halls	233	250
Coffee Shops	119	119
Pubs and Bars	77	77
Institutional Contracts		
Universities and colleges	45	225
Schools	5485	3000
Hospitals and Prisons	103***	250
	Total	3385

Source: *Ministry OF Tourism **Estimated numbers, ***Ministry of Health

Jordan imports most of the food and beverages it consumes. In 2005, the value of agricultural imports reached U.S. \$1.45 billion; food imports totaled U.S. \$52 million. The U.S. is an important agricultural supplier to Jordan with a value of US \$50 million (Jordan's agricultural product imports from the US are valued at US \$121 million). The EU's sales to Jordan amount to U.S. \$77.5 million, about the same value imported from Saudi Arabia. Other main suppliers include Syria, Egypt and Lebanon.

Table 3: Jordan food imports sources in 2005

Country	Food imports in million U.S.\$	% To all food imports
Saudi Arabia	78	11
EU	77.5	11
Syria	69	9
Egypt	68	9
USA	50	6.5
Lebanon	28	4

The data in Table 3 illustrates the importance of factors such as shipping costs and the effects of trade agreements such as the Greater Arab Free Trade Area (GAFTA), which zeroes out custom tariffs.

A Free Trade Agreement (FTA) between Jordan and the United States entered into force in 2001. Since then, Jordan has steadily eliminated trade barriers between the two countries, a process that will be completed within 10 years. This has helped create new commercial opportunities for U.S. firms seeking to enter the Jordanian market and the Middle East region.

As Jordanian society has become more urbanized, more women joined the workforce, creating mid to upper income consumers more dependent on restaurants and ready made or processed food. Purchasing frozen/ready to cook products has increased. Food retailers

have expanded their businesses and become more customer driven in their approach to the product range and services (See Food Retail Report JO3006).

Table 4: Jordan Average Annual Household Expenditure on Food Items in 2003

Food and Beverages Items	U.S.\$
Cereals and Cereal Products	416.655
Meats and Poultry	792.561
Fish	53.157
Dairy Products and Eggs	395.787
Oils and Fats	234.483
Fruits	213.474
Vegetables	308.931
Dry and Canned Legumes	34.545
Spices and Food Additives	67.539
Nuts	50.478
Sugar, Confect and Honey	207.975
Tea, Coffee and Cacao	125.349
Other Food Items	172.443
Beverages	92.919
Total	3166.296
Alcohol	1.128
Tobacco and Cigarettes	307.239
Total	309.495

A more sophisticated life style, expansion of the service sector in the country, and the adoption of an open, western lifestyle has also increased the demand for dietetic and low calorie food items.

The growing number of tourists has also boosted demand in the HRI sector, both foreign and domestic. In 2005 around 5.8 million visitors arrived in Jordan, of which 52 percent were overnight tourists. Further increases are hampered by ongoing political unrest in the region.

Market access is the first challenge for U.S. exporters. U.S. products have not only to comply with Jordan regulations but also have to cater to Middle Eastern tastes, culture and ethics. They must also compete with similar products from Jordan, neighboring Arab countries and EU countries, which often enter at lower prices due to lower shipment costs and occasionally government subsidies.

Table 5: Advantages and Challenges Facing U.S. Products in Jordan's HRI Sector

Advantages	Challenges
Fast food chains are boosting demand for U.S. products.	U.S. products are at a price disadvantage compared to local market and European products due to relatively high U.S. freight costs.
The tourism industry demands more fast and international foods.	There is limited experience and low awareness in how to develop a western style HRI sector
U.S. culture is very popular among Jordanians; products perceived as new to market have a wide appeal to Jordanians.	Only 5 percent of the 5.5 million Jordanians can afford to purchase imported food products.
U.S. products offer quality and variety for the local food service industry.	Exporter perceptions of difficulties in conducting business in the region due to political tensions reduce the level of potential exports to Jordan.
The growing retail sector is demanding new food products.	U.S. exporters are not aware of the Jordan market potential for some of their products.
Importers generally like trading with U.S. exporters because of reliability and the quality of service.	Lack of awareness of the variety and diversity of U.S. products.
The number of supermarket chains is expanding.	Jordanians with limited income assume that imported products from the U.S. are more expensive than those locally or regionally produced.
More Jordanians are taking up a modern (western) life style. Eating habits and shopping patterns are adapting to the growing availability of American- style malls.	Lack of brand awareness.
	Lack of knowledge and training in the purchasing and handling of U.S. products.
Under the Free Trade Agreement (FTA) between Jordan and the United States, customs duties will be eliminated. The sales tax on agricultural products is 4 percent, much lower than the General Services Tax of 16 percent.	Imports from the U.S. cost much more due to high freight costs.
The availability of the GSM-102 and supplier Credit Guarantee Programs could help lower the costs of importing U.S. products.	Difficulty of recruiting U.S. companies to attend trade shows in the region.
	American products suffer from anti-American political sentiments.
	Misperception that Jordan is an "unsafe destination" due its Location. This remains the main barrier against near and long – term growth in the tourism industry.
	Insufficient government funding of the Jordan Tourism Board, hindering it from fully fulfilling its mission.

	<p>Low visitor spending: A visitor spends an estimated USD 485 in Jordan per stay compared to a world average of USD 670. High airfares are a major impediment to growth.</p>
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A main characteristic of the Jordanian food sector, including all supermarket chains and almost any public food service, is the Halal issue (animal products must come from animals slaughtered observing Islamic traditions). In addition, Arabic labeling with visual emphasis on alcohol free and pork fat free can add to product appeal. Public food services cannot serve food (of animal origin) that is not Halal. All institutional food suppliers and hotels are strictly Halal; other (non-Halal) items can be found only in restricted areas.

The last few years have been challenging for Jordan's economy, and for the tourism industry in particular. Political unrest, acts of terrorism, and the global economic recession hampered the tourism sector and hurt many other industries. However, Jordan tourism industry has survived other difficult periods and can turn these challenges into opportunities.

II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

Jordan's retail food sector has been rapidly expanding over the last ten years, developing supermarkets and superstore retailing which offers U.S. suppliers an opportunity.

The best way for a U.S. company interested in exporting products to the Jordan HRI is to find an importer, an agent or a wholesaler well experienced with the HRI sector.

Wholesale importers can facilitate custom clearance and advise the exporter on how to comply with product-specific regulations such as labeling, packaging, import duties, and sanitary regulations.

U.S. suppliers should also research the Jordanian market and be prepared to comply with Jordan's labeling requirements, both official and customers', such as Arabic labels on food items with visual emphasis on 'Alcohol Free and Pork Fat Free'. Be prepared to entertain orders that are smaller than normal and share a shipment with other U.S. exporters or mix products in one shipment.

Most food distributors acquire their imported products through an importer or an agent who are often also distributors with warehouses and transportation means. However, there are occasions in which supermarket chains and large HRI chains import directly.

With the growing size of supermarket outlets in Amman and other major cities of Jordan, FAS Amman encourages exporters of food products to organize trade missions; conduct awareness seminars and orient promotional campaigns to these retailers; and initiate direct contacts with Jordanian importers and owners of supermarkets. Also, U.S. cooperators are encouraged to organize in-store promotions. The promotions can include recipes using American ingredients. Live cooking presentations/sampling/displaying different American brands will help build awareness of U.S. food products.

FAS Amman encourages U.S. exporters to participate in the annual Gulf Food and Hotel and Equipment Exhibition, which takes place in Dubai, UAE.

Since 1987, Gulf food has been considered the Middle East and North Africa's primary business platform for food, drink, foodservice and hospitality equipment. The exhibition is a showcase for manufacturers, distributors, and suppliers from around the world, representing

all key sectors within food and hospitality. FAS Amman encourages all Jordanian food importers/supermarket-purchasing officials to attend the exhibition. This year 74 American food companies participated in this exhibition and 35 Jordanian importers concluded direct contacts with American food companies attending the show.

TABLE 6: Distribution channels for food, alcoholic beverages and confectionery

Food	Supermarkets, mini supermarkets Large, medium and small grocery stores Hotels and restaurants
Alcoholic Beverages	Hotels Restaurants with license for alcoholic Beverages Liquor shops (very limited) Bars (very limited)
Confectionery	Large, medium and small grocery shops

Tips from importers on how to penetrate the Jordanian market:

- Most importers seek a brand name that they can develop.
- All importers want exclusivity on a brand name for a few years.
- Importers believe that promotion is essential for increased sales; therefore, they usually ask the exporter for a partial investment in a promotion campaign.

Guidelines for working in the Jordanian market:

- You can sample Jordanian market tastes by sending your product and price information to importers. Include labels and harmonized tariff numbers with the samples and ask importers for their opinion on the marketability of your product. Add a reply fax and/or e-mail form to facilitate their responses.
- Consider the range of trade shows and exhibit your product in the most relevant show, such as the annual Gulf Food, Hotel and Equipment Exhibition and Salon Culinaire in Dubai, UAE.
- Innovation can help increase demand for a U.S. product. Innovation can be exhibited through the product itself, the packaging or pricing. The most popular products are typically the newest and have a higher than average trade margin as well as a professional support plan.
- U.S. exporters and suppliers need to focus their efforts on working with importers and distributors who serve the HRI sector, since food service companies rely on their suppliers for product selection.

B. MARKET STRUCTURE

Food and beverage (F&B) represents around 35 percent of total hotel revenues. percent of hotels' core business comes from the rooms department, with banqueting (not restaurants) making up a significant portion of food and beverage revenues.

C. SUB-SECTOR PROFILES

1. Hotels

Tourism is very important to the Jordanian economy. Jordan is a popular tourist destination; offering a wide variety of tourist accommodations. The tourism infrastructure is developing rapidly throughout the country and continuously expanding. In 2005 there were total of 474

hotels, hostels, campgrounds, and tourist rental apartments; providing 41 thousand beds for accommodations. The tourism industry is currently suffering from the after effects of the November 9, 2005 terrorist attacks on three hotels; political unrest in the surrounding countries adversely affects the arrival of tourists; and the economic pressures caused by high petroleum prices decreases the number of Jordanians staying at hotels in Jordan.

About 25 percent of hotels' beds and rooms in Jordan are five stars, 65 percent are divided between three and four stars, and the remaining ten percent are in one star category.

The 20 percent increase in tourist arrivals in Jordan during 2004 clearly contributed substantially to the revival of the hotel business across the country. The total number of overnight non-Jordanian visitors estimated for 2005 registered a 15 percent increase over the figure for 2004 (2.3 million).

Detailed information on hotel operations is hard to obtain and not regularly compiled. Many hotel owners consider that their financial statements should not be made public as they could reveal marketing and operational strategies

2. Restaurants

In 2005 there were 614 restaurants in Jordan, with fast food the fastest growing sub sector. Hamburger chains are the biggest in size, customers and revenue; pizza chains come next and are more broadly distributed around the country; but Middle Eastern fast food (such as falafel) is the most popular in the country. .

The leaders of fast food in Jordan for 2005 were McDonald's that took 45 percent of the market; following were the local Burger Ranch with 34 percent, and Burger King with 21 percent.

The leading Italian food chains are Pizza Hut, which takes 66 percent of all of the sector's sales. Popeye's and Domino's also compete in this market.

Hundreds of small corner shops serve Middle Eastern snack foods, very popular in Jordan, especially shawarma, falafel, and hummus. These are served as either a sandwich or on plates.

It is predicted that the fast food market will grow by some 25 percent over the next five years, some fast food chains are planning ambitious expansion both vertical and horizontal depending on their own reading of the future demand.

In addition to in-hotel restaurants, many five stars restaurants are spreading mainly in Amman serving western and oriental *gourmet* food, some specialized in certain cultural food such as Chinese, Japanese, Indian, Greek or general Mediterranean /Lebanese. The typical Jordanian drinks are soft drinks during lunchtime. Jordanians refrain from alcoholic beverages due to religious and ethical causes; high tariffs and taxes also make it expensive. Many Jordanians do not consume alcohol at all. Despite the relatively high price charged for wines at restaurants, wines are often consumed over dinners at 5 star restaurants.

Due to water shortages, scarcity and water system problems, drinking water must be artificially refined before consumption. Therefore, family size 20 liters bottles are a very prosperous business and consumption of bottled mineral water is on rise.

Table 8. Market Share of Different Fast Foods by Type, Jordan 2005

Type	Value Share Percentage*
<i>Shawarma, Falafil and Homos Sandwiches</i>	65
Hamburger	20
Pizza	10
Others	5

* Estimated figures

Table 9: Prominent Fast Food Chains in Jordan 2005

Fast food Restaurants	Number of branches
PIZZA HUT	14
POPEYE'S	8
Chili House	8
MacDonald's	6
K.F.C	6
Burger king	5
Donuts Factory	4
Dominos Pizza	3
Boston fried chicken	3
Chili ways	3
Chix- Filet	2
Hardeez	1
Others	3

Celebration halls are part of this sub sector. There are approximately 233 halls in which weddings are celebrated annually, serving about 2 million meals, sweets and soft drinks. These halls are sometimes used for political assemblies and family (tribe) matters, in addition to churches that serve as assembly halls during certain religious and social events that serve more than 10000 meals annually.

3. Institutional

In addition to Jordanian Armed Forces Food Institute, there are three main companies in the institutional food service, which cater to the US army in Iraq and serve as main contractors and subcontractors. These companies control more than 95 percent of the total market.

III. COMPETITION

In 2005, according to Jordanian statistics, the main food exporters to Jordan were Saudi Arabia, Syria, Egypt, EU and the U.S. In 2005 Jordan imported \$ 519 million worth of food products (\$34 million in food products from the US). US Food exports to Jordan amounted to 6% of total Jordan's food imports.

Domestic and EU suppliers are the main competition for US exporters. The US industry's main advantage lies in the normalization and standardization of regulations for products, reliability in supply, and product's quality. On the other hand, higher shipping costs are the main barriers to entering the market.

US exporters must be competitive in their pricing and present products of excellent quality. Jordan has a large food production industry of its own. There is also strong price competition among food importers seeking to maintain or enlarge their market share. Nearby EU countries supply sophisticated foods and beverages to the Jordanian market and enjoy relatively low transportation costs. On the other hand, US products benefit from tariff rate quotas and preferential customs tariffs. As a result of Jordan's trade agreements, new low-priced supplies are entering the Jordanian market from countries such as Turkey, Hungary and Bulgaria.

The US food industry has a very positive image in Jordan based on consumer confidence in its reliability and food safety reputation. At the same time, American foods do not always have reputation of being fine cuisine. Likewise, some Jordanians believe that Jordanian-made products are of higher quality and better comply with Jordanian food tastes.

TABLE 10: RETAILS SALES The following table details Jordanian imports for the following products categories (Jan. – Dec. 2004 \$ mil)

Product	Total Imports In Million \$	Imports from The U.S. In Million \$	U.S. Market Share (%)	Import Tariff
Meat, offal	14	0.213	1.5%	
Cheeses	8.9	2.0	22%	None
Almonds	4.8	4.4	92%	
Bovine semen & embryos	0.297	0.034	11.4%	
Apples, fresh	14.3	0.388	3%	
Coffee, roasted	9.0	0.083	1%	None
Rice	61.0	12.5	28%	None
Seeds for sowing	8.4	1.8	21%	
Soybean oil, refined	22.8	0.388	2.5%	15%
Corn oil, refined	15.0	13.6	90%	15%
Butter	6.2	1.1	18%	None
Natural honey	1.6	0.009	0.5%	15%
Chewing gum and sugar confectionery	8.5	0.186	2%	15%
Cocoa powder	2.0	0.012	1%	None
Milk in powder	47.61	0	0	None
Spices	0.406	0.028	7%	None
Powdered juices	4.945	0.547	11%	15
Ready food pastry products	4.601	0.760	16.5%	10/10
Water, including mineral water	15.585	0.009	0.06%	15
Other non alcoholic beverages	0	0	0	42.5
Other wine, grape must with fermentation	0.443	0.01	0.2%	153
Whiskies & Hard liquors	1.864	0.033	2%	153
Vinegar	0.245	0.065	20%	15
Cigarettes	4.047	0.220	5.5%	80
Tobacco for smoking	7.280	0.033	1%	80
Source: DOS Editor Calculations:				

IV. BEST PRODUCT PROSPECTS

A. Products in the market, which have good sales potential:

- Condiments
- Cake baking mixes
- Rice
- Desserts
- Juices (powder)
- Breakfast Cereals
- Almonds
- Legumes

B. Products not present in the market, but which have good sales potential:

- Merluza frozen fish
- Chicken leg quarters
- Juices in tetra pack
- Candies
- Frozen cooking butter in block
- Frozen French fries
- Pecan
- Cheeses

C. Products not present in significant quantities, but which have good sales potential:

- Deli cuts: smoked turkey breasts, ham, port bacon
- Refined Corn oil
- Salted snacks
- Turkey

D. Products not present in supermarkets because they face significant custom barriers due to ethical and religious issues:

- Wine
- Beer
- Whiskies
- Cigars

Some other barriers include strict sanitary and phytosanitary SPS measures

- Poultry
- Beef (also due to prices)

V. POST CONTACT AND FURTHER INFORMATION**FAS Jordan Contact Details**

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Amman Chamber of Commerce
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<http://www.cbs.gov.jo/>
<http://www.mit.gov.jo/>
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